TS-EAS EAC team Chicago meeting

EAD3 Reconciliation

29 July 2020

Shared and similar elements (1/2)

- Defined as shared based on using the same element and the same tag name in both EAS
  - E.g. <function> and <occupation>
- Defined as similar based on seemingly having (close to) the same scope in both EAS
  - E.g. <span> in EAC-CPF and <emph> in EAD3

Shared and similar elements (2/2)

- Confirm the status of an elements' pair as either shared or similar
- Ensure that (confirmed) shared elements are defined and described in the same way
  - With the potential option for slightly different approaches in the content model (keyword: mixed content)
- Ensure that (confirmed) similar elements show their difference in the way they are defined and described

To start with a side note

Discussed in other contexts (1/4)

- <objectXMLWrap>
  - TS-EAS Annual Meeting on 6 August: keep or scrap?
- <p>
  - Discussed in Berlin on 11 March
  - Different content model to be approached via technical solution in the schema

Discussed in other contexts (2/4)

- <dateRange>
  - Discussed in Austin and in various virtual meetings
  - Alignment of attributes for sub-elements
  - Sub-elements can be empty, but one of <fromDate> or <toDate> has to be there
  - Addition of @certainty ([#75](#)) and the new @status ([#70](#)) to sub-elements <fromDate> and <toDate>

Discussed in other contexts (3/4)

- <date>
  - Discussed in various virtual meetings
  - On the agenda for TS-EAS Annual Meeting on 4 August
- <dateSet>
  - Intended change with regard to <date> (in EAD) will also resolve the current difference with regard to <dateSet>

Discussed in other contexts (4/4)

- <nameEntry> and <corpname> etc.
  - Discussed in the Joint EAC/EAD meeting on 10 July
  - Parallelism in these elements and their use confirmed, but not strong enough to justify more alignment
  - Decision to make sure that the documentation and examples clarify how they differ
- <placeEntry> and <geogname>
  - On the agenda for 31 July
  - Please make sure to provide examples

Shared elements

<address> and <addressLine> (1/2)

- Postal or other address broken down into one or more lines
- Different content model for <addressLine> to be approached via technical solution in the schema
- Other changes mainly in EAD
  - Question of enabling @localType with <address>
    - Pending the TS-EAS Annual Meeting on 6 August
  - Question of making <address> repeatable within <repository>

<address> and <addressLine> (2/2)

- In both EAS separated from the element that captures the name of the place/location/geographic feature
- Available instead within the according wrapper elements:
  - <place> in EAC
  - <publicationstmt> and <repository> in EAD3
    - Neither actually includes a <geogname> element
- Consider in the context of discussing <placeEntry> and <geogname> -> either today or on 31 July

<legalStatus> (1/5)

- Used in [EAC-CPF](#) to **encode information about** the legal status of a corporate body
  - With same sub-elements as other singular elements, i.e. <citation>, <date>, <dateRange>, <dateSet>, <descriptiveNote>, <placeEntry>, <term>
- Used in [EAD3](#) to **identify** the status of the material being described as defined by law
  - With same sub-elements as other descriptive siblings to <did>, i.e. <blockquote>, <chronlist>, <head>, <list>, <p>, <table> and <legalstatus> itself

<legalStatus> (2/5)

- Questions for EAC-CPF
  - Is there potential for setting up <legalStatus> not as a singular element but as more of an "informal descriptive element" similar to <biogHist>, <generalContext> and <structureOrGenealogy>?
  - I.e. could <legalStatus> come to also include <list> and maybe even <chronlist>?

<legalStatus> (3/5)

Adapted encoding example if <legalStatus> were an informal descriptive element (and would be made repeatable following the use of language attribution with all non-empty elements)

```
<legalStatus>
  <descriptiveNote>
    <p>Federal, state and local laws apply, as follows.</p>
    <p>Student records are governed by the Family Educational Rights and Privacy Act (FERPA),
    20 U.S.C. § 1232g.</p>
    <p>Patient records are governed by the Health Insurance Portability and Accountability Act,
    Pub.L. 104-191 and 110 Stat. 1936. Article 8 ECHR may also apply.</p>
  </descriptiveNote>
  <chronlist>
    <chronitem>
      <event>Family Educational Rights and Privacy Act (FERPA) signed into law</event>
      <date standardDate="1974-08-21">August 21, 1974</date>
      <placeEntry>United States of America</placeEntry>
    </chronitem>
    <chronitem>
     [for the other laws mentioned following the model above]
    </chronitem>
  </chronlist>
</legalstatus>
```

<legalStatus> (4/5)

- Questions for EAD
  - Is there potential for setting up <legalstatus> as a sub-element of <did>, seeing that it is about identification rather than extensive description?
  - I.e. could <legalstatus> have a similar model to <langmaterial>, with a <descriptivenote> (which - via <p><ref> - would include an equivalent to <citation>), the set of date elements, a <geoname> and (maybe) a <term>?

<legalStatus> (5/5)

Adapted encoding example if <legalstatus> were a sub-element of <did>

```
<did>
  <legalstatus>
    <term>Student records</term>
    <descriptivenote>
      <p>Federal, state and local laws apply, as follows.</p>
      <p>Here: Student records are governed by the Family Educational Rights and Privacy Act
      (FERPA), 20 U.S.C. § 1232g.</p>
    </descriptvenote>
    <date standarddate="1974-08-21">August 21, 1974</date>
    <geogname>
      <part>United States of America</part>
    </geogname>
  </legalstatus>
  <legalstatus>
    <term>Patient records</term>
    <descriptivenote>
      <p>Federal, state and local laws apply, as follows.</p>
      <p>Here: Patient records are governed by the Health Insurance Portability and
Accountability
      Act, Pub.L. 104-191 and 110 Stat. 1936. Article 8 ECHR may also apply.</p>
    </descriptiveNote>
  </legalstatus>
</did>
```

<part> (1/3)

- Used in EAC-CPF to distinguish components of the name of the described entity
  - I.e. only with <nameEntry>
- Used in EAD3 to encode one or more parts of an access term

<part> (2/3)

- Main remaining difference in use of attributes refers to @valueURI, @vocabularySource and @vocabularySourceURI
  - Equivalents are available in EAD3, but not in EAC-CPF
  - Confirm adding these to <part> ahead of the more general conversation on 31 July?
- Different content model to be approached via technical solution in the schema

<part> (3/3)

- Use with all access terms in EAD3 means that:
    - EAD3 also uses <part> (repeatable) as sub-element of <function> and <occupation>, where EAC-CPF uses <term> (not repeatable)
    - EAD3 also uses <part> (repeatable) as sub-element of <geogname>, where EAC-CPF only includes [text] directly in <placeEntry>
    - Consider in the context of discussing these parent elements on the following slides respectively on 31 July

<term> (1/2)

- Used in EAC-CPF as a generic element to encode a descriptive term in accordance with local descriptive rules
  - Available in <function>, <legalStatus>, <localControl>, <localDescription>, <mandate>, <occupation>
- Used in EAD3 only as a child element of <localcontrol> to specify a descriptive term in accordance with local rules

<term> (2/2)

- Both EAS already include equivalents of the attributes @valueURI, @vocabularySource and @vocabularySourceURI for <term>
- EAD3 also includes these for the parent elements <function> and <occupation>
  - Consider adding these attributes to <function> and <occupation> during the conversation on 31 July?

<occupation> (1/3)

- Used in EAC-CPF to **provide information about** the occupation of the CPF entity being described
  - With <term> and others as sub-elements
  - Referencing of vocabularies etc. only via <term>
- Used in EAD3 to **specify** a profession
  - Only with <part> as sub-element
  - Referencing of vocabularies available with both

<occupation> (2/3)

- Question of <term> vs. <part> for certain controlled access terms (mainly for EAD perspective)
  - Does <part> make more sense with the <*name> elements and potentially <title>, while <term> might be a better choice for <function>, <genreform>, <occupation>, and <subject>?
- Question of using @valueURI etc.
  - Does it make sense to enable the referencing of vocabularies for both, <occupation> and <term>/<part>?

<occupation> (3/3)

- Additional questions for EAD
  - Is there potential to enable the set of date elements and a <geoname> (or <placeentry>) with all controlled access elements?
  - Is there potential to also enable <descriptivenote> with all controlled access elements, which (via <p><ref>) would include an equivalent to <citation>?

\<function> (1/4)

- \<function>
  - Used in <u>EAC-CPF</u> to **provide information about** a function, activity, role, or purpose performed or manifested by the CPF entity being described
    - With \<term> and others as sub-elements
    - Referencing of vocabularies etc. only via \<term>
  - Used in <u>EAD3</u> to **encode** activities and processes related to the production of materials
    - Only with \<part> as sub-element
    - Referencing of vocabularies available with both

Functions in context (2/4)

- International Standard for Describing Functions (ISDF)
- TS-EAS' intent to create an Encoded Archival Context - Functions (EAC-F)
- Records in Contexts Conceptual Model
  - Uses Function as a form of Activity, which is an entity of its own (RiC-E15)
    - "In a corporate or government context an Activity may also be called a function."

<function> (3/4)

- General question
  - Should the new version of EAC-CPF already prepare for functions being an entity of their own with their own EAS to encode further details?
  - I.e. would <function> still be part of <description> or would the <relations> model make sure that related functions can be described and referenced?

<function> (4/4)

- General question (continued)
  - <term> could be covered by <targetEntity>
  - A URI in <citation> could be covered by @sourceReference etc. with <relation> or @valueURI etc. with <targetEntity>
  - The set of date elements is present as sub-elements of <relation>
  - <place> is present as sub-element of <relation> (including <placeEntry>)
  - Only <descriptiveNote> would not be covered

<biogHist> and its sub-elements (1/2)

- On the agenda for TS-EAS Annual Meeting on 6 August
- Differences in terms of attributes have been solved via the general decisions on attributes usage
- Main differences in terms of sub-elements:
  - <biogHist> in [EAC-CPF](#) includes , <citation>, and <outline>
    - EAD would have , but only within <did>
    - EAD would have <p><ref> instead of <citation>
  - <bioghist> in [EAD3](#) includes <blockquote>, <head>, and <table>, plus <bioghist> itself

<biogHist> and its sub-elements (2/2)

- Questions with regard to sub-elements
  - Use case and usefulness of <outline>?
    - To be discussed in a virtual EAC team meeting
  - <chronitemset> as sub-element of <chronitem> to pair a date with one or more events and zero or more geographic names
    - Enable <chronitemset> in EAC-CPF?
  - <list>
    - Different content model to be approached via technical solution in the schema

Similar elements

Pending similar elements

- <span> and <emph>
- Additional similar elements (from EAD perspective)
  - <unitid>, <identityId> and other identifier elements
    - Review to see if these could have an aligned content/data model
    - Note: RiC has a general Identifier attribute (RiC-A22) for all entities
  - <didnote> and <descriptivenote>
  - Candidates to be subsumed in a resource <relation>
    - , <otherfindaid>, <relatedmaterial>, and <separatedmaterial>